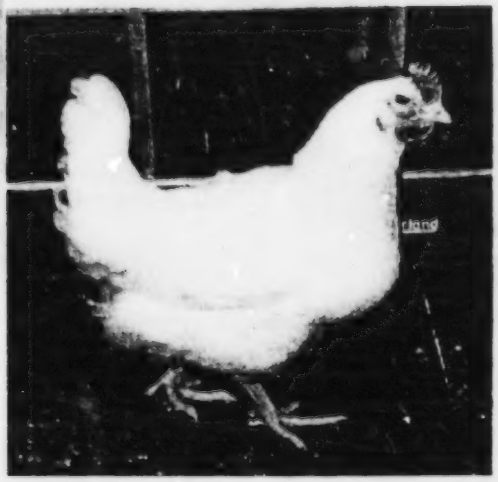
Manitoba
Agriculture
and Food

Program & Policy Analysis

2001

Manitoba Poultry Industry Profiles



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- TURKEY SECTOR 13-18

Sources:
Agriculture and Agri-Food Canada
Canadian Egg Marketing Agency
Canadian Turkey Marketing Agency
Chicken Farmers of Canada
Manitoba Agriculture and Food
Manitoba Chicken Producers
Manitoba Egg Producers
Manitoba Turkey Producers
Statistics Canada

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EGG SECTOR

EGG SECTOR PROFILE

Production:

Egg production is concentrated in south-eastern Manitoba, with about three-quarters of production taking place within an 80-km radius of Winnipeg. The industry includes hatcheries, started pullets, feed production, egg production, graders and further processors. There is a high degree of organization, co-operation and co-ordination from hatchery through to egg processing.

Three provincial hatcheries set 18.5 million eggs in 2001 and hatched over 7 million pullet chicks. More than 3.3 million pullet chicks were placed in Manitoba pullet operations, while about 3.7 million were sold out-of-province. In 2001, there were 174 registered egg producers with over 2.198 million layers producing under regular quota, 0.5 million layers under special market development quota and 0.3 million layers under Eggs for Processing quota. About 300 unregistered producers (permitted to have 100-499 layers) had a total of 85,000-90,000 layers.

Marketings and Trade:

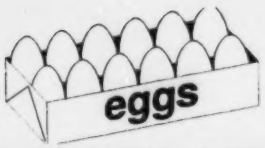
Manitoba commercial egg marketings in 2001 (regular quota - registered and unregistered production) fell by 1.0 percent to 52.33 million dozen valued at over $64 million. The prices Manitoba producers receive for their eggs are determined in part by a formula based on the average cost of production over a given time period. Three commercial grading stations and 36 registered farmer graders in the province graded 50.09 million dozen eggs in 2001. About 59.7 percent of all graded eggs were A Large, X-Large and Jumbo. Registered producers marketed about 2.25 million dozen eggs privately. Eggs produced under special market development quota totalled 11.72 million dozen and there were 5.28 million dozen eggs produced under the Eggs for Processing program. These eggs were valued at about $8.5 million. Of total Manitoba egg marketings (excluding hatching eggs), 37.56 million dozen went to local processors and 0.58 million dozen to processors in the rest of Canada. About 31.19 million dozen were retailed as table eggs to consumers in Manitoba and other provinces. About 3 million dozen eggs were brought into the province for use by Manitoba processors.

Processing:

The Eggs for Processing program allows local egg producers to expand their flocks in order to provide eggs under contract to Manitoba processors to supply growing processed market requirements. This additional Manitoba production replaces most of the eggs that were being imported from the United States by Canadian Inovatech Inc., the largest egg processor in Canada. Canadian Inovatech and the other major Manitoba egg processor, Burnbrae Farms Ltd., produce many innovative, value-added products for the food and pharmaceutical industries. The egg processors continue to develop numerous products from egg white, yolk and shell. These two operations exported egg products valued at about $19.8 million in 2001.

Potential:

Manitoba's egg industry has the potential to expand by supplying more eggs for processing market growth. Manitoba egg producers are among the most efficient, quality-conscious producers in Canada and have a competitive advantage over many other areas.



EGG SECTOR

	1998	1999	2000	2001	'01 as a % of '00
EGG PRODUCTION OPERATIONS:	194	180	177	174	98
LAYERS ON FARMS JULY 1 ('000):					
Hens (incl. unregistered)	2,293	2,465	3,064	3,085	101
Hens (quota - regular)	2,098	2,128	2,151	2,198	102
Hens (quota - special market dev.)			818	800	98
PROVINCIAL HATCHERIES:					
Hatcheries (No.)	3	3	3	3	100
Eggs Set (million)	13.2	15.6	16.6	18.5	111
All Chicks Hatched (million)	10.4	12.8	12.6	14.6	116
Pullet Chicks Placed in Mb (million)	2.56	3.31	3.20	3.31	103
HATCHERY SUPPLY BREED. STOCK:					
Flocks	13	15	11	15	136
Hens ('000)	65	93.3	87.1	114.6	132
PULLET GROWING OPERATIONS:					
Commercial	21	14	14	14	100
Other	86	85	85	84	99
Pullets Sold (million)	2.3	2.3	3.1	3.2	103
FARM VALUE OF SALES ($ million):	**47.9**	**53.0**	**72.1**	**72.9**	**101**
Eggs for Hatching	0.2	0.6	0.5	0.4	80
Eggs for Consumption	47.7	52.4	71.6	72.5	101
% of Canada	10.0	10.9	14.4	13.3	
EGG PRICES (cents/dozen):					
Average All Grades (before levies)	118.0	115.2	120.1	124.0	103
Average Grade A Large	123.7	124.2	128.9	134.8	105
EGG MARKETINGS (million dozen):					
Graded (registered)	46.33	48.36	49.78	49.09	99
Graded (unregistered)	0.72	0.72	0.78	0.99	127
Off-farm Private Sales	2.31	2.45	2.31	2.25	97
Commercial Marketings-regular	**49.36**	**51.53**	**52.87**	**52.33**	**99**
Eggs for Special Market Develop.			**18.40**	**17.00**	**92**
EGG GRADING ('000):					
No. of Commercial Grading Stations	3	3	3	3	100
No. of Farmer Graders	36	36	36	36	100
EXPORTS OF EGGS/EGG PRODUCTS:					
Value of Hatching Eggs ($ million)	0.16	0.23	0.53	0.36	68
Value of Eggs/Egg Products ($ million)	12.49	16.35	15.58	19.81	127
IMPORTS OF EGGS/EGG PRODUCTS:					
Value of Hatching Eggs ($ million)	0.50	0.66	0.79	0.93	118
Value of Eggs/Egg Products ($ million)	8.63	6.42	3.34	4.94	148
CDN. PER CAPITA CONSUMPTION:					
Eggs (incl. product) (dozen fresh equiv)	15.2	15.3	15.7	16.0	102

EGG INDUSTRY CHART, 2001

HATCHERY SUPPLY
BREEDING FLOCKS: 15
HENS: 114,610

PROVINCIAL HATCHERIES
3 YEAR ROUND
EGGS SET: 18.5 M
CHICKS HATCHED: 14.6 M
PULLET CHICKS:
PLACED IN MB: 3.3 M
NET OTHER SALES: 3.7 M

INTERPROVINCIAL OUT:
HATCHING EGGS: 578,417
PULLETS/CHICKS: 1,442,508

EXPORTS TO U. S.:
HATCHING EGGS: 412,000
PULLET CHICKS: 2,692,000

INTERPROVINCIAL IN:
HATCHING EGGS: 297,474
PULLET CHICKS: 46,394

IMPORTS FROM U. S.:
HATCHING EGGS: 893,000
PULLET CHICKS: 358,000

PULLET OPERATIONS:
14 (COMM.) 84 (OTHER)
PULLETS SOLD: 3.2 M

EGG PRODUCTION OPERATIONS:
REGISTERED PRODUCERS: 174
REGISTERED LAYERS -REG: 2.27 M
LAYERS FOR SPEC. MKT. DEV: 0.87 M
EGGS PRODUCED (dozen): 69.33 M
TOTAL V ALUE OF EGGS: $72.5 M

ANNUAL FEED REQUIRED:
$25 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES:
$46 million (excl. levies)

PRIVATE SALES:
2.25 M dozen

GRADERS:
24.13 M dozen

REGISTERED GRADING STATIONS:
EGGS GRADED: 50.09 M dozen
COMMERCIAL GRADERS: 3
FARMER GRADERS: 36

MANITOBA EGG PRODUCERS
- SETS PRICE
- ALLOCATES QUOTA
- AGENT FOR CEMA'S INDUST. PROD. PROG.

TABLE MARKETS:
CEMA 4.82 M dozen
OTHER: 26.37 M dozen

CANADIAN EGG MARKETING AGENCY
- SETS QUOTA
  - Regular Quota: 25.96 M dozen
  - Sp. Market Dev. Quota: 11.72 M dozen
  - Eggs for Processing 5.28 M dozen
- INDUSTRIAL PRODUCT PROGRAM

PROCESS MARKETS:
Reg. Quota 21.14 M doz
Special Mkt: 11.72 M doz
Eggs for Proc.: 5.28 M doz

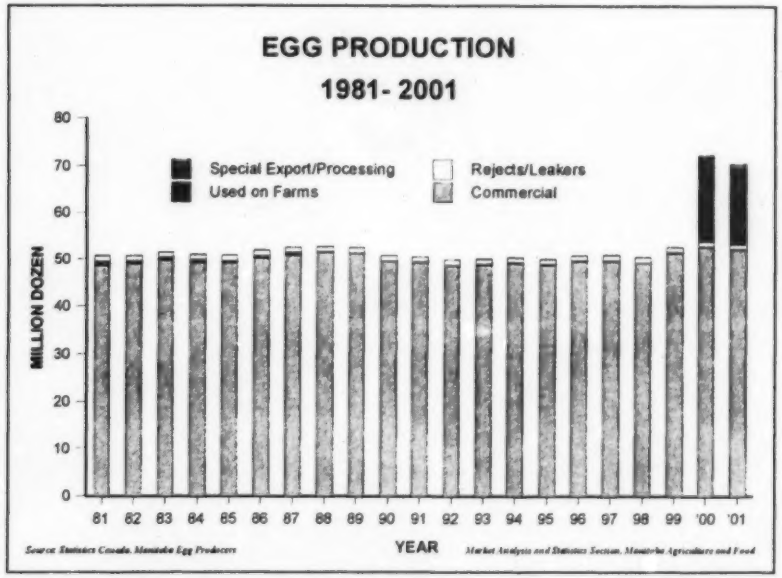
CANADIAN TABLE EGG MARKETS
MB. EGGS: 31.19 M dozen

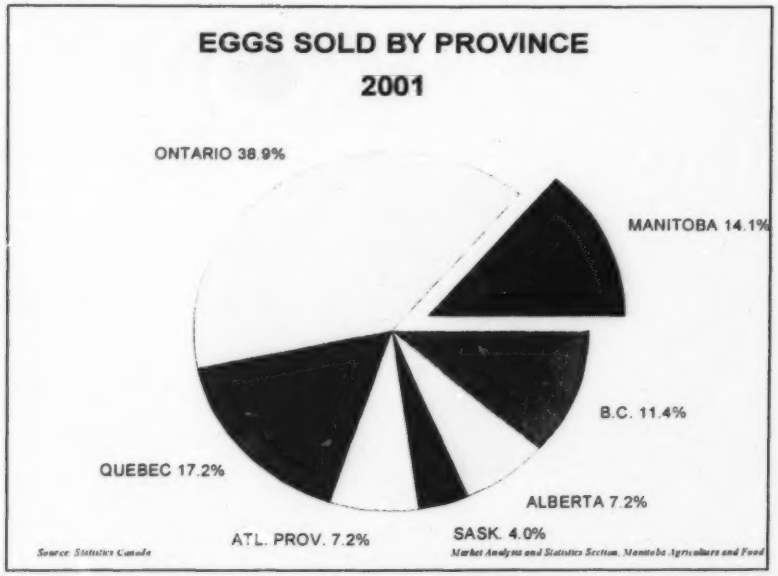
OTHER PROVINCES:
PROCESSORS: 0.58 M dozen
EGG PRODUCTS: N/A

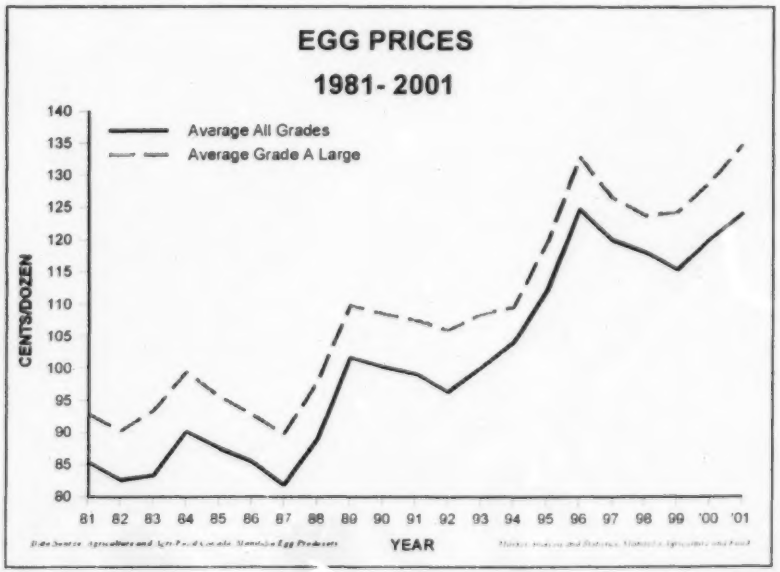
MANITOBA EGG PROCESSORS:
2
EMPLOYEES: 112
EGGS :
Manitoba: 37.56 M dozen
Non-Mb: 3 M dozen

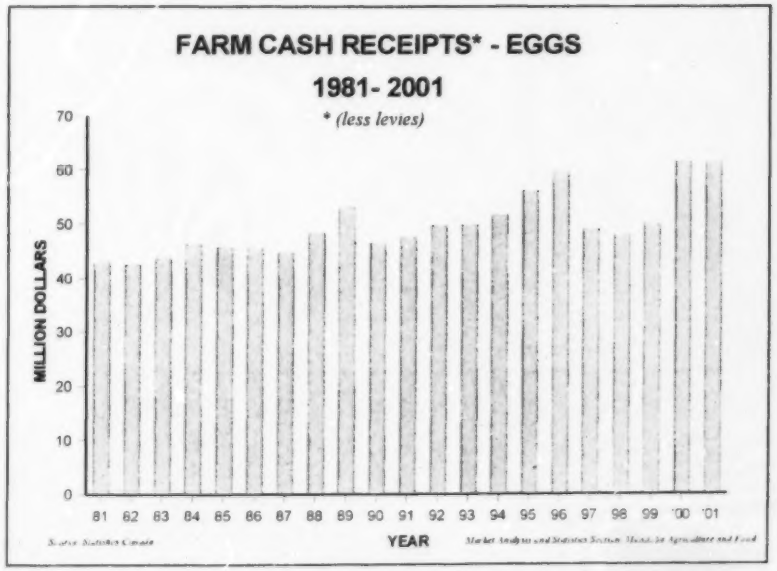
EXPORTS:
EGG PRODUCTS: $19.8 M

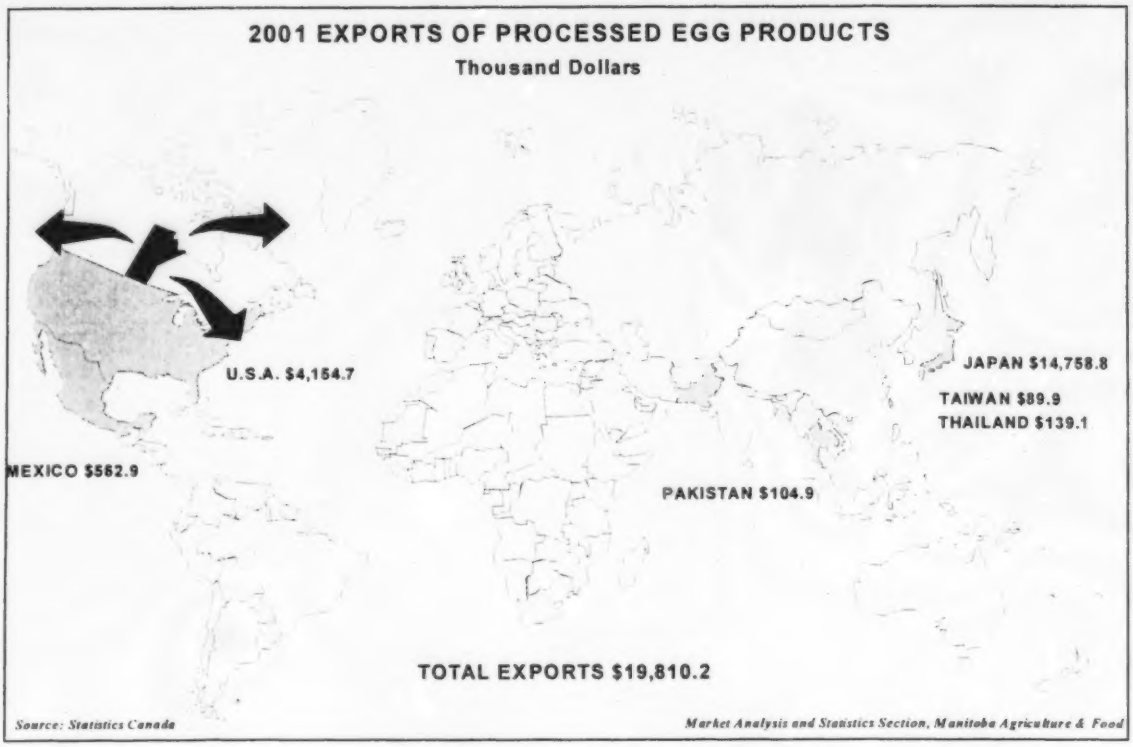
DATA SOURCE: Manitoba Egg Producers, Agriculture and Agri-Food Canada, Statistics Canada.


EGG PRODUCTION
1981- 2001
Special Export/Processing
Used on Farms
Rejects/Leakers
Commercial
MILLION DOZEN
YEAR
Source: Statistics Canada, Manitoba Egg Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


EGGS SOLD BY PROVINCE
2001
ONTARIO 38.9%
MANITOBA 14.1%
B.C. 11.4%
ALBERTA 7.2%
SASK. 4.0%
ATL. PROV. 7.2%
QUEBEC 17.2%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

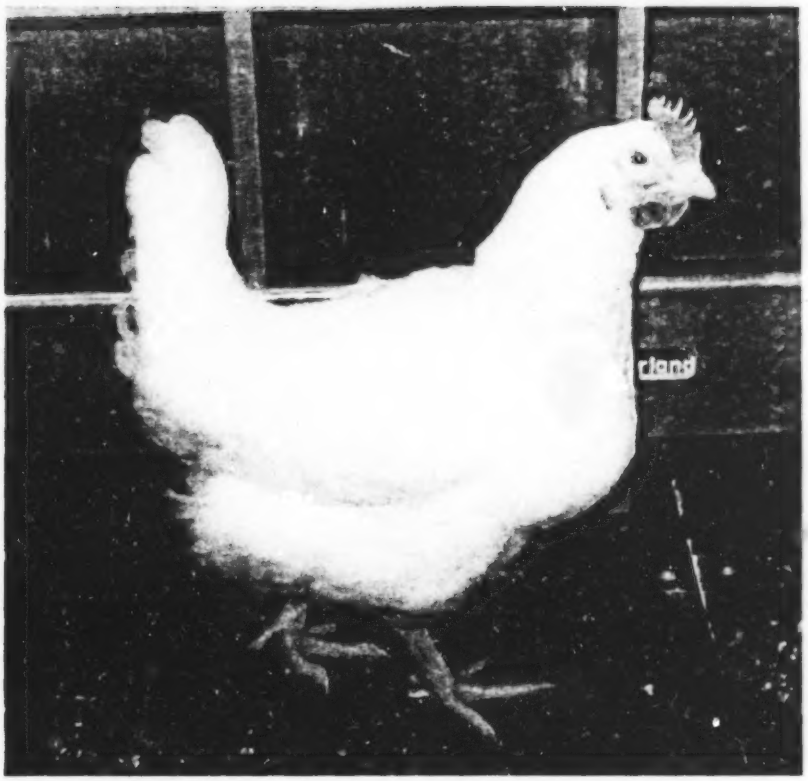

EGG PRICES
1981- 2001
Average All Grades
Average Grade A Large
CENTS/DOZEN
YEAR


FARM CASH RECEIPTS* - EGGS
1981- 2001
* (less levies)
MILLION DOLLARS
YEAR


2001 EXPORTS OF PROCESSED EGG PRODUCTS
Thousand Dollars
U.S.A. $4,154.7
MEXICO $562.9
JAPAN $14,758.8
TAIWAN $89.9
THAILAND $139.1
PAKISTAN $104.9
TOTAL EXPORTS $19,810.2
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

2001 IMPORTS OF EGGS AND EGG PRODUCTS
Thousand Dollars
U.S.A. $4,935.3
TOTAL IMPORTS $4,935.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

BROILER CHICKEN SECTOR



BROILER CHICKEN SECTOR PROFILE

Production:

Most broiler chicken farms are located in the south-eastern corner of the province. Chickens are raised indoors where they are protected from the weather and predators and where they have the freedom to move, eat and drink at will. There were 124 registered broiler chicken producers in Manitoba with about 3.75 million birds on farms in July 2001. The size of farms ranges from about 120,000 chickens produced per year to 1.5 million chickens produced. Any non-registered chicken production marketed through a federally or provincially-inspected plant is limited to 999 birds per producer and must be covered by an exemption permit. In addition, there were about 0.23 million broiler chickens on 600 other farms in the province, most of which were destined for on-farm use. Four year-round and one seasonal hatchery supplied the industry in Manitoba with 31.0 million chicks in 2001. Over 37.3 million hatching eggs were obtained by the hatcheries from 40 local hatchery supply breeding flocks as well as from other provinces and the United States.

Marketings:

Sales of registered broiler chickens increased by 5.5 percent to more than 27.7 million chickens in 2001, of which almost all weighed between 1.2 and 2.6 kilograms (live weight). There was also non-registered production of only 58,000 chickens, most of which were roasters (over 2.6 kilograms live weight). Most of the non-registered chickens are slaughtered on a custom-kill basis. Total Manitoba broiler chicken sales rose by 5.5 percent to almost 27.8 million chickens valued at close to $64 million.

Processing and Trade:

There were two plants in Manitoba, which slaughtered and processed the majority of the registered chickens marketed in the province in 2001, Granny's Poultry Co-operative (Man) Ltd. and Dunn-Rite Food Products, Ltd., as well as one secondary processor, Prairie Produce, Inc. The 38.9 million kg of eviscerated chicken processed in 2001, valued at an estimated $91 million, was up by 6.3 percent from the 2000 level. Inter-provincial trade in chicken involves the sale of whole chickens, chicken parts and "canners". More than 2.10 million kg of fowl, chicken and chicken parts, valued at $9.80 million, was imported directly into Manitoba from the U.S. in 2001 mainly for sale through a major retail chain. Manitoba exported 2.85 million kg of chicken/fowl valued at $2.85 million in 2001.

Potential:

There is room for growth in Manitoba's broiler chicken industry for the domestic market due to supply management under the National Allocation and Pricing Agreement. Each province is allowed to increase its chicken production by a maximum of 8 percent over the base in each period. There is also potential for growth to supply export markets. Prairie poultry producers generally have a competitive advantage over many other areas in Canada

BROILER CHICKEN SECTOR

	1998	1999	2000[R]	2001[P]	'01 as a % of '00
REG. BROILER CHICKEN FARMS:	129	128	124	124	100
NO. OF BROILERS – JULY 1 ('000):	3,110	3,290	3,500	3,980	114
% of Canada	4.7	4.8	4.7	4.6	
PROVINCIAL HATCHERIES:					
Hatcheries (No.)	8	7	5	5	100
Eggs Set (million)	33.4	30.1	34.3	37.3	109
Chicks Hatched (million)	26.4	24.0	27.5	29.4	107
Chicks Sold (million)	25.8	25.6	28.9	31.0	108
HATCHERY SUPPLY BREED STOCK:					
Flocks	36	36	38	40	105
Hens ('000)	147.7	178.5	195.8	215.9	110
FARM CASH RECEIPTS ($ million):					
Hens and Chickens	53.4	56.0	56.7	63.3	112
% of Canada	4.0	4.2	4.2	4.2	
BROILER CHICKEN PRICES ($ each):					
Broilers (under 1.2 kg live)	1.40	1.35	1.29	1.44	112
Broilers (1.2-2.6 kg live)	2.25	2.20	2.11	2.30	109
Roasters (over 2.6 kg live)	4.25	4.00	4.20	4.50	107
CHICKEN MARKETINGS ('000 birds):	24,238	24,943	26,331	27,787	106
Registered marketings:	24,200	24,892	26,283	27,729	106
Broilers (under 1.2 kg live)	344	0	0	0	
Broilers (1.2-2.6 kg live)	23,665	24,822	26,277	27,657	105
Roasters (over 2.6 kg live)	191	70	6	72	
Non-registered marketings:	38	51	48	58	121
Stewing hens (fowl) ('000 birds)	1,680	1,340	1,400	1,400	100
CHICKEN PROCESSING ('000):					
Number of Slaughter Plants	2	2	2	2	100
Chicken Processed (million kg evis)	31.6	35.1	36.6	38.9	106
Value of Processed Chicken ($M)	90	86	90	91	101
EXPORTS OF CHICKEN/FOWL MEAT:					
Quantity (tonnes)	951.9	1,244.8	1,218.2	2,849.3	234
Value ($'000)	714.8	1,083.4	991.0	2,850.5	288
IMPORTS OF CHICKEN/FOWL MEAT:					
Quantity (tonnes)	3,559.9	2,398.8	1,551.6	2,103.6	136
Value ($'000)	16,997.2	9,777.8	6,839.6	9,795.6	143
CDN. PER CAPITA CONSUMPTION:					
Chicken (eviscerated kg)	26.1	27.8	28.9	29.5	102

BROILER CHICKEN INDUSTRY CHART, 2001

HATCHERY SUPPLY
BREEDING STOCK ON FARMS
FLOCKS: 40
HENS: 215,900
HATCHING EGGS PLACED: 26.3 M

EXPORTS TO U.S.:
HATCHING EGGS: 0.0 M
CHICKS: 0.0 M

INTERPROVINCIAL OUT:
HATCHING EGGS: 0.08 M
CHICKS: 0.30 M

IMPORTS FROM U.S.:
HATCHING EGGS: 10.77 M
CHICKS: 1.30 M

INTERPROVINCIAL IN:
HATCHING EGGS: 0.27 M
CHICKS: 0.62 M

PROVINCIAL HATCHERIES
4 YEAR ROUND
1 SEASONAL
EGGS SET: 37.3 million
CHICKS HATCHED: 29.4 million
CHICKS PLACED: 31.0 million

ANNUAL FEED REQUIRED:
$27 million

BROILER PRODUCTION
REGISTERED PRODUCERS : 124
MARKETINGS: 27.787 M birds
REGISTERED: 27.729 M birds
NON-REGISTERED: 0.058 M birds
TOTAL VALUE: $64 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES:
$34 million

PRIVATE SALES:
58,000 birds

MANITOBA CHICKEN PRODUCERS
- NEGOTIATES PRICE
- REGULATES QUOTA

CHICKEN FARMERS OF CANADA
- SETS GLOBAL QUOTA

2 SLAUGHTER/PROCESS PLANTS
1 PROCESSING PLANT
EMPLOYEES: approx. 600
SLAUGHTER: 27.7 million birds
EVISC.WEIGHT: 38.9 million kg
WHOL. VALUE (est) $91 million

EXPORTS:
2.85 million kg
$2.85 million

INTERPROVINCIAL OUT:
Whole, parts, canners

INTERPROVINCIAL IN:
SASKATCHEWAN: 0 tonnes
ALBERTA: 0 tonnes

IMPORTS FROM U. S.:
2.10 million kg
$9.80 million

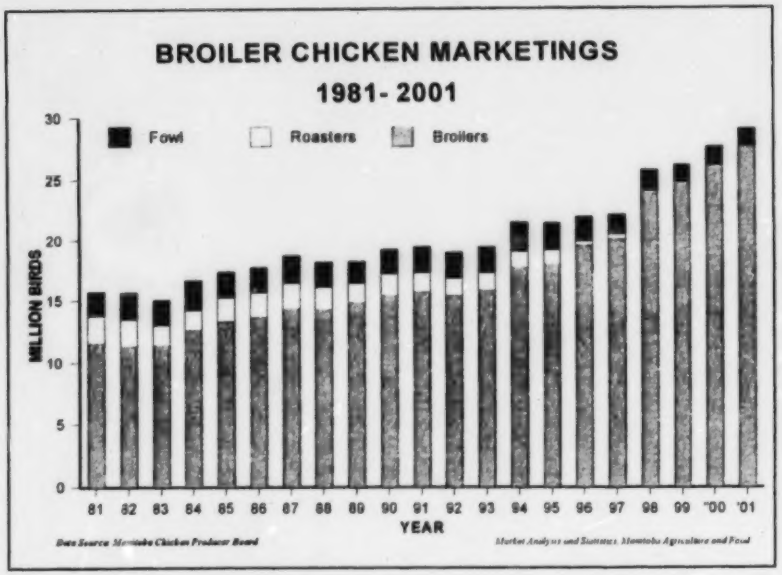
MANITOBA MARKET
FRESH AND FROZEN PRODUCT

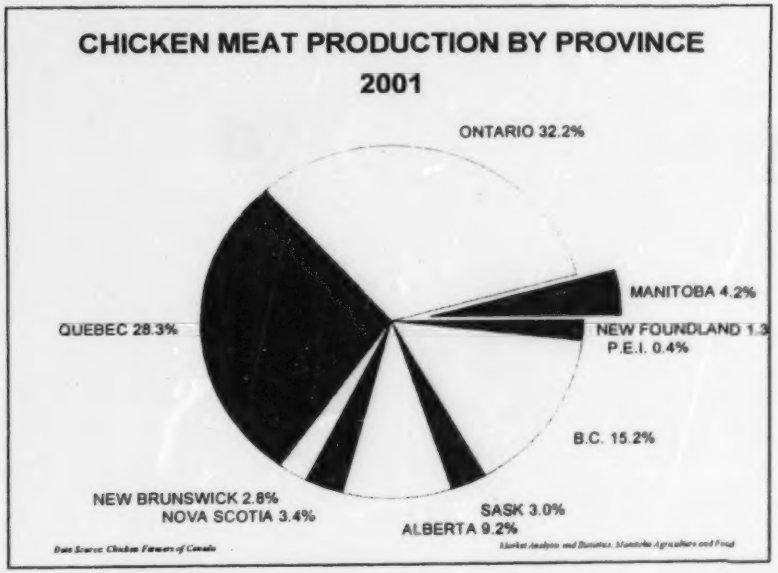
FAST FOOD & RESTAURANT

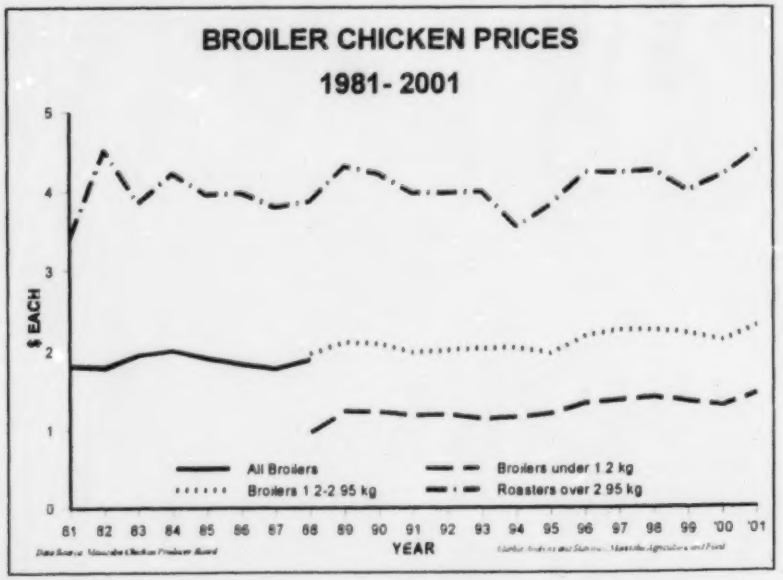
RETAIL STORES

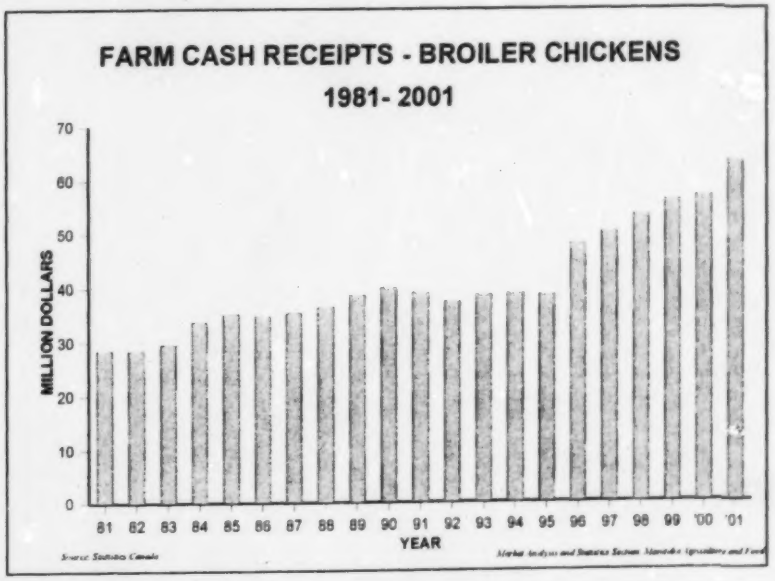
FURTHER PROCESSING

DATA SOURCE: Agriculture and Agri-Food Canada, Manitoba Chicken Producers, Statistics Canada.

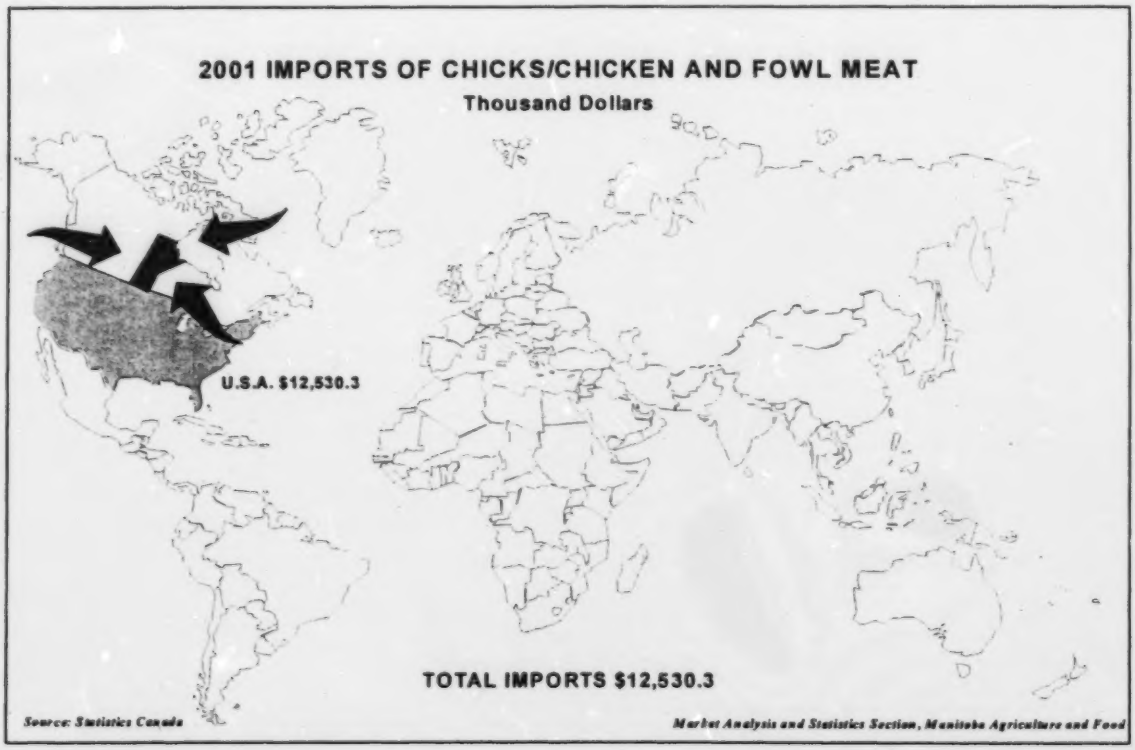

BROILER CHICKEN MARKETINGS
1981- 2001
Fowl
Roasters
Broilers
MILLION BIRDS
30
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR


CHICKEN MEAT PRODUCTION BY PROVINCE
2001
ONTARIO 32.2%
MANITOBA 4.2%
NEW FOUNDLAND 1.3
P.E.I. 0.4%
QUEBEC 28.3%
B.C. 15.2%
NEW BRUNSWICK 2.8%
NOVA SCOTIA 3.4%
SASK 3.0%
ALBERTA 9.2%


BROILER CHICKEN PRICES
1981- 2001
$ EACH
5
4
3
2
1
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR
All Broilers
Broilers 1.2-2.95 kg
Broilers under 1.2 kg
Roasters over 2.95 kg


FARM CASH RECEIPTS - BROILER CHICKENS
1981- 2001
MILLION DOLLARS
70
60
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR

2001 EXPORTS OF CHICKS/CHICKEN AND FOWL MEAT
Thousand Dollars
RUSSIA $330.2
CHINA $23.3
U.S.A. $2,109.3
CUBA $2,298.8
S. KOREA $57.5
HONGKONG $19.6
PHILLIPINES $8.7
EL SALVADOR $56.3
PERU $33.2
SOUTH AFRICA $12.4
TOTAL EXPORTS $4,949.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 IMPORTS OF CHICKS/CHICKEN AND FOWL MEAT
Thousand Dollars
U.S.A. $12,530.3
TOTAL IMPORTS $12,530.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

TURKEY SECTOR

TURKEY SECTOR PROFILE

Production:

A major portion of turkey production occurs in south-eastern Manitoba with large concentrations along the Trans-Canada highway to Portage la Prairie and south of Teulon up to Riverton and Arborg. In 2001, 67 registered commercial producers and over 50 non-registered turkey producers had about 694,000 birds on farms in July, a decrease of 11 percent from the previous year and about one-tenth of the Canadian flock. There were 8 hatchery supply breeding stock farms with 75,100 hens and one provincial hatchery, which set 9.1 million eggs and sold 6.7 million poults in 2001.

Marketings:

Turkey marketings in 2001 totalled 1.31 million birds, of which 194,000 were broilers (under 5.75 kg live), 611,000 were hens (5.75-9.0 kg live) and 505,000 were toms (over 9.0 kg live). Turkey sales decreased by 10.6 percent from 2000 due to fewer hens and broilers being marketed. Average weights increased over the year. Total farm-gate receipts (less levies) from turkey production in 2001 amounted to $17.3 million, down by 2.8 percent from 2000.

Processing:

Manitoba had one turkey slaughter and processing plant in 2001, Granny's Poultry Co-operative, Ltd., which slaughtered all registered birds marketed in the province. There was also one main secondary processor of turkey meat in 2001, Prairie Produce Inc. About 11.8 million kg of fresh and frozen turkey and turkey products, with an *estimated* value of about $35 million, were produced in 2001.

Trade:

Manitoba is involved in active trade in hatching eggs, poults and turkey meat. The trade in hatching eggs and poults is with the United States, Saskatchewan, Ontario, Quebec, British Columbia and Alberta. In 2001, there were 0.36 million Manitoba hatching eggs and 2.32 million poults sold to other provinces, while 0.19 million eggs and 0.004 million poults were brought into Manitoba from other provinces. Almost 0.31 million kg of turkey meat and processed products, valued at $1.81 million, were imported from the United States in 2001, but none has been shipped into Manitoba from Saskatchewan and Alberta for the past few years. Manitoba exported 0.61 million kg of turkey meat valued at $0.36 million to 10 countries, Jamaica, South Africa, West Africa, China, Hong Kong, Japan, Philippines, Russia, West Indies and Bahamas, in addition to exporting 2.59 million poults valued at $6.43 million to the United States. Manitoba imported 1.99 million hatching eggs and 0.15 million poults from the U.S. in 2001.

Potential:

Growth in Manitoba's turkey industry outside of the domestic quota system is possible by supplying additional export markets for both eviscerated and live birds. Domestic turkey consumption has been relatively stable for the past twelve years at 4-5 kg per person, but as turkey is a nutritious alternative to other meats, there is also potential to increase consumption. The winter tom bonus program provides much-needed tom turkeys during the winter months.

TURKEY SECTOR

	1998	1999	2000[R]	2001[P]	'01 as a % of '00
REGISTERED TURKEY FARMS (NO.):	73	70	68	67	99
TURKEYS ON FARMS JULY 1 ('000):	694	753	779	694	89
PROVINCIAL HATCHERIES:					
Hatcheries (No.)	1	1	1	1	100
Eggs Set (million)	4.9	5.4	7.2	9.1	126
Poults Sold (million)	3.75	4.1	5.4	6.7	124
HATCHERY SUPPLY BREED STOCK:					
Flocks (No.)	8	8	8	8	100
Hens ('000)	53.7	54.3	63.2	75.1	119
FARM CASH RECEIPTS ($ million):					
Turkeys	17.3	17.1	17.8	17.3	97
% of Canada	6.9	7.1	6.8	6.6	
TURKEY PRICES ($ each):					
Broilers (under 5.75 kg live)	8.22	7.88	8.07	8.30	103
Hens (5.75-9.0 kg live)	11.49	10.76	10.85	11.08	102
Toms (over 9.0 kg live)	17.68	17.14	17.04	17.23	101
TURKEY MARKETINGS ('000):					
Broilers (under 5.75 kg live)	224	151	260	194	75
Hens (5.75-9.0 kg live)	626	610	719	611	85
Tom (over 9.0 kg live)	470	543	486	505	104
TURKEY PROCESSING ('000):					
Number of Processing Plants	1	1	1	1	100
Mb. Turkey Processed (million kg)	11.7	11.6	12.6	11.8	94
Est. Value of Process. Turkey ($M)	33	34	37	35	95
EXPORTS OF TURKEY MEAT/PROD:					
Turkey meat (tonnes)	703.3	813.9	403.2	611.7	152
Turkey meat ($'000)	492.2	370.7	229.6	359.8	157
Poults ($'000)	2,319.5	2,477.6	3,761.7	6,431.7	171
IMPORTS OF TURKEY MEAT/PROD:					
Turkey meat (tonnes) (from U.S.)	442.1	374.2	256.3	307.2	120
Turkey meat ($'000)	2,157.1	2,084.8	1,483.1	1,808.9	122
Poults ($'000)	178.5	163.3	334.6	37.7	11
CDN. PER CAPITA CONSUMPTION:					
Turkey (eviscerated kg)	4.3	4.2	4.3	4.3	100

TURKEY INDUSTRY CHART, 2001

HATCHERY SUPPLY
BREEDING STOCK ON FARMS
FLOCKS: 8
HENS: 75,100

EXPORTS TO U.S.:
HATCHING EGGS: 0
POULTS: 2,590,000

INTERPROVINCIAL OUT:
HATCHING EGGS: 356,580
POULTS: 2,315,810

IMPORTS FROM U.S.:
HATCH. EGGS: 1,988,000
POULTS: 154,000

INTERPROVINCIAL IN:
HATCHING EGGS: 192,190
POULTS: 4,090

PROVINCIAL HATCHERY
EGG SET: 9.1 M
POULTS HATCHED: 6.7 M
POULTS PLACED: 1.7 M

ANNUAL FEED REQUIRED:
$7.5 million

TURKEY PRODUCTION
REGISTERED PRODUCERS: 67
POULTS PLACED: 1.7 M birds
MARKETINGS: 1.31 M birds
MARKET VALUE: $17.3 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES (excluding levies):
$9 million

MANITOBA TURKEY PRODUCERS
- NEGOTIATES PRICE
- REGULATES QUOTA

CANADIAN TURKEY MARKETING AGENCY
- SETS GLOBAL QUOTA

MEAT EXPORTS:
0.61 million kg
$0.36 million

OTHER PROVINCES:
WHOLE, BONE-IN, BONELESS PARTS:
40-45 % of sales

1 PROCESSING PLANT
1 SECONDARY PROCESSSOR
SLAUGHTER: 1.31 million birds
MEAT WEIGHT: 11.8 million kg
EST. VALUE: $35 million

INTERPROVINCIAL IN:
SASKATCHEWAN: 0 M kg
ALBERTA: 0 M kg

IMPORTS FROM U.S.:
0.31 million kg
$1.81 million

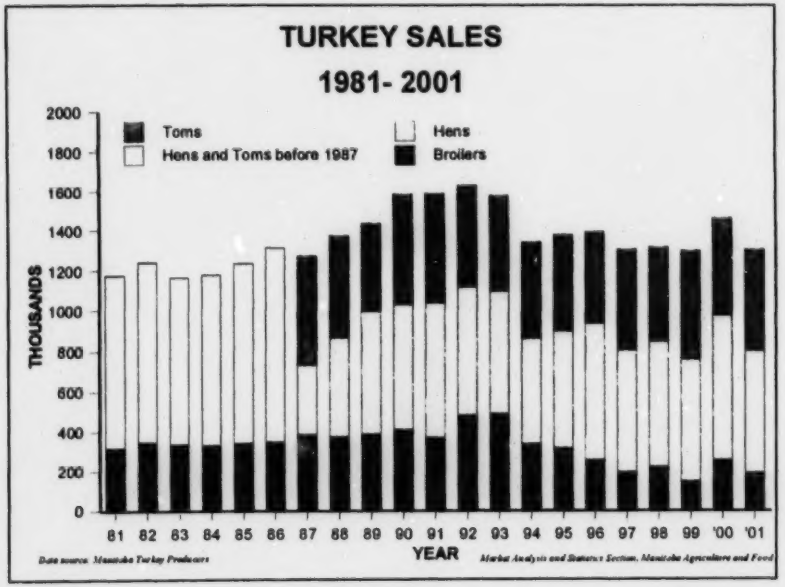
MANITOBA MARKET FRESH AND FROZEN
40 %

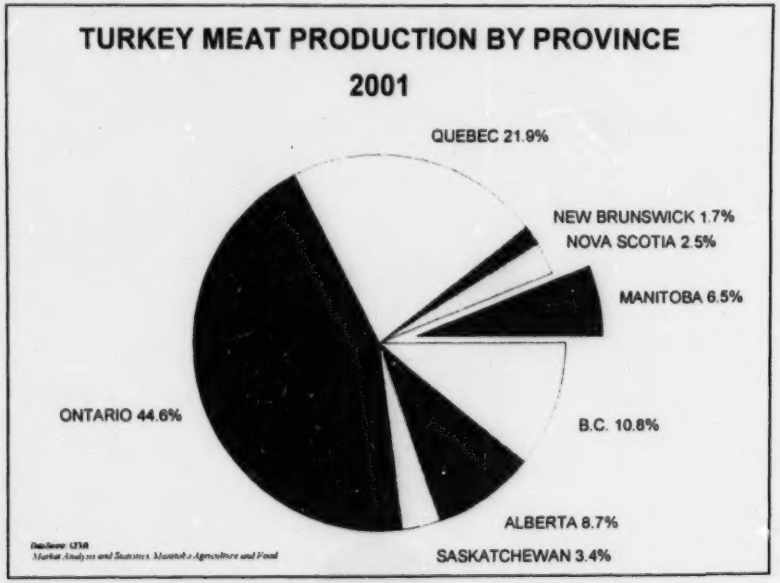
FAST FOOD & RESTAURANT

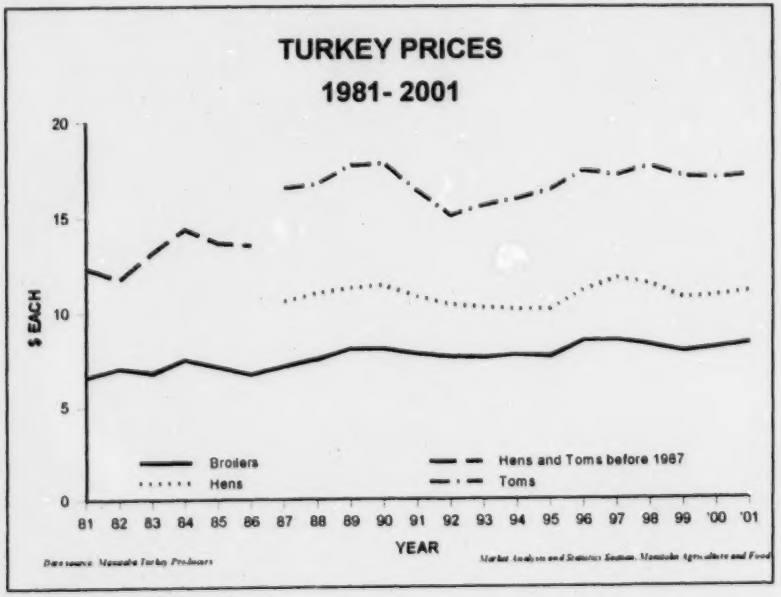
RETAIL FOOD STORES

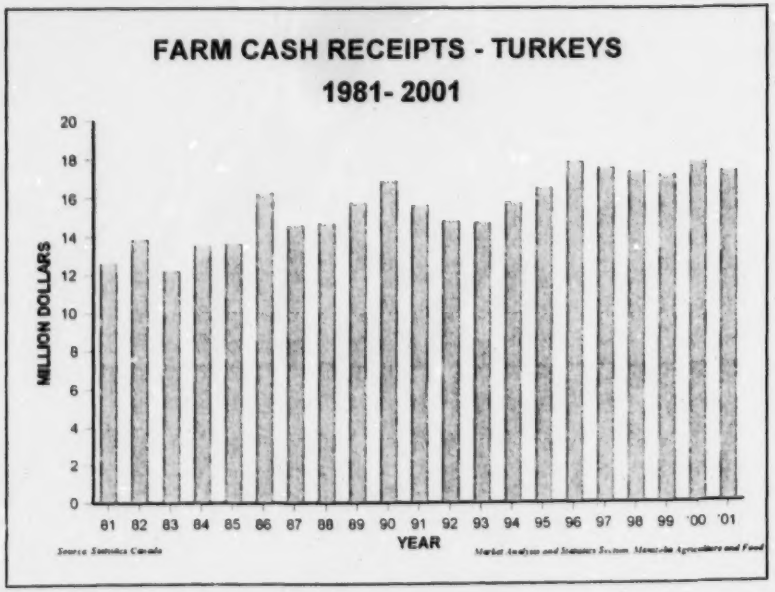
FURTHER PROCESSING

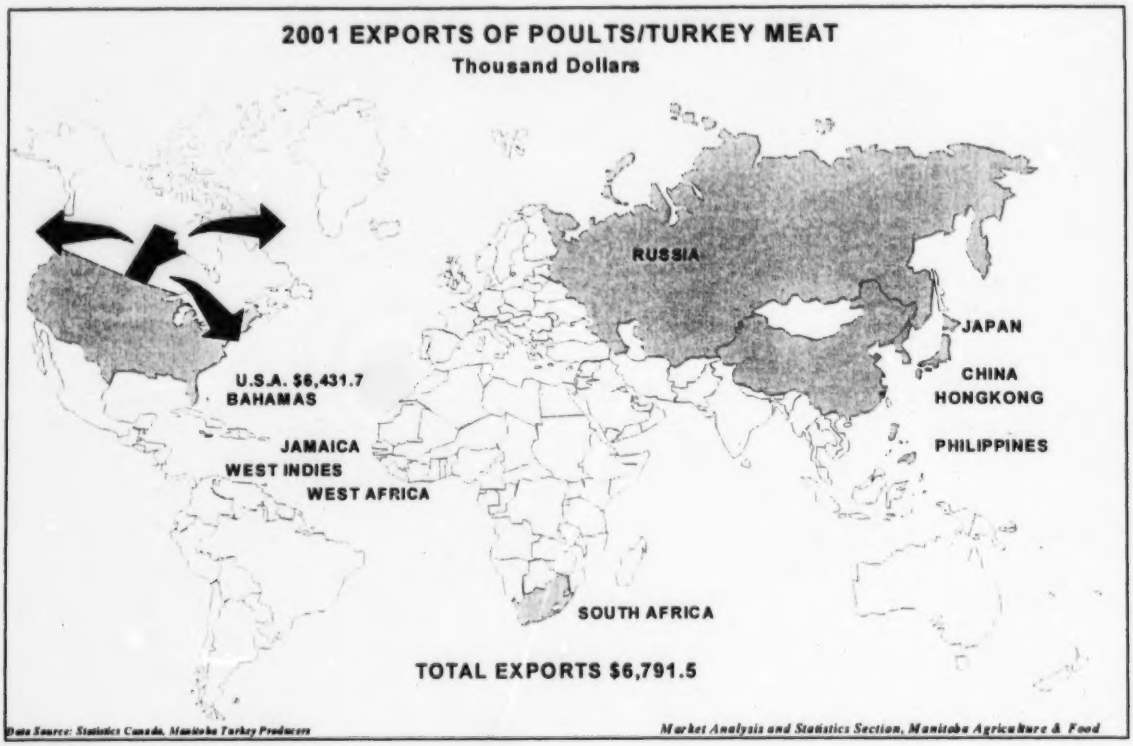
DATA SOURCE: Agriculture and Agri-Food Canada, Manitoba Turkey Producers, Statistics Canada.

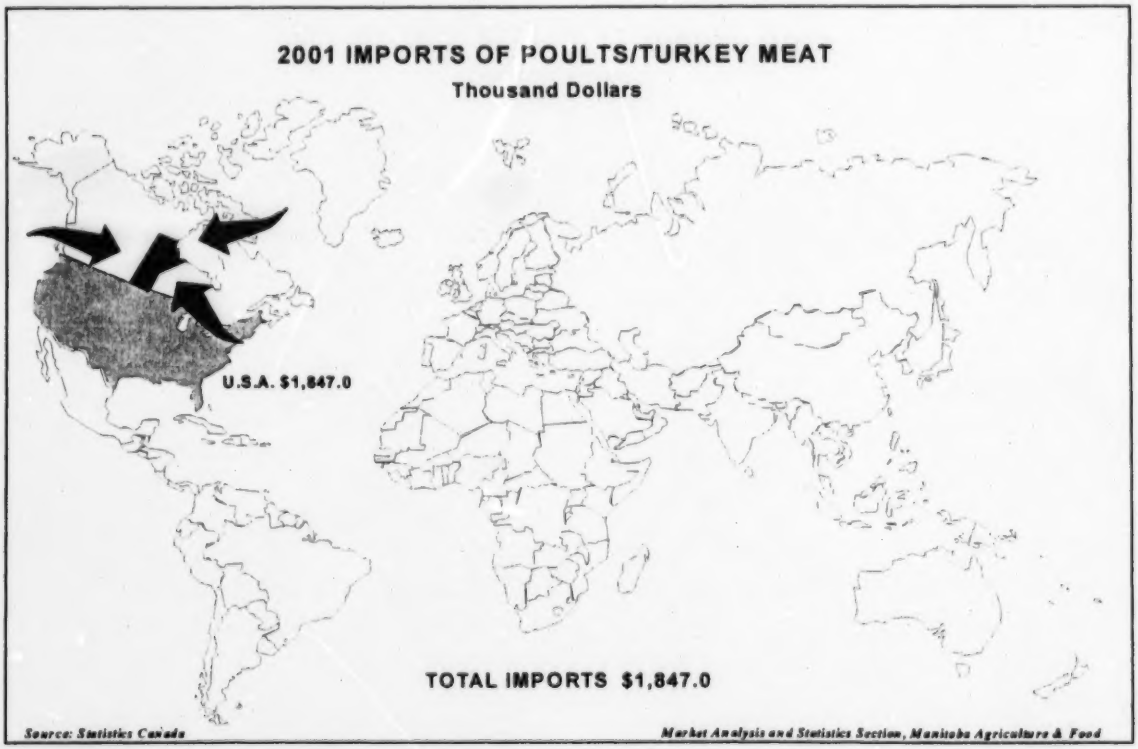

TURKEY SALES
1981- 2001
Toms
Hens and Toms before 1987
Hens
Broilers
THOUSANDS
2000
1800
1600
1400
1200
1000
800
600
400
200
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR
Data source: Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


TURKEY MEAT PRODUCTION BY PROVINCE
2001
QUEBEC 21.9%
NEW BRUNSWICK 1.7%
NOVA SCOTIA 2.5%
MANITOBA 6.5%
ONTARIO 44.6%
B.C. 10.8%
ALBERTA 8.7%
SASKATCHEWAN 3.4%
Market Analysis and Statistics, Manitoba Agriculture and Food


TURKEY PRICES
1981- 2001
$ EACH
20
15
10
5
0
Broilers
Hens
Hens and Toms before 1987
Toms
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR
Data source: Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FARM CASH RECEIPTS - TURKEYS
1981- 2001
MILLION DOLLARS
20
18
16
14
12
10
8
6
4
2
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 EXPORTS OF POULTS/TURKEY MEAT
Thousand Dollars
RUSSIA
JAPAN
CHINA
HONGKONG
PHILIPPINES
U.S.A. $6,431.7
BAHAMAS
JAMAICA
WEST INDIES
WEST AFRICA
SOUTH AFRICA
TOTAL EXPORTS $6,791.5
Data Source: Statistics Canada, Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2001 IMPORTS OF POULTS/TURKEY MEAT
Thousand Dollars
U.S.A. $1,847.0
TOTAL IMPORTS $1,847.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food